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JORDAN TOURISM DEVELOPMENT PROJECT (SIYAHA)

JORDAN: TOURISM SATELLITE ACCOUNT 2006/2007
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JORDAN TOURISM DEVELOPMENT PROJECT (SIYAHA)

**JORDAN: TOURISM SATELLITE ACCOUNT 2006/2007
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ACRONYMS

ASEZA	Aqaba Special Economic Zone Authority
BDS	Business Development Service
CBO	Community-Based Organization
COM	Council of Ministers
DCA	Development Credit Authority
DOA	Department of Antiquities
GAM	Greater Amman Municipality
HRDC	Human Resource Development Corporation
IBLAW	International Business Legal Advisors
ILO	International Labor Organization
IR	Intermediate Result
IT	Information Technology
JHTEC	Jordan Hospitality and Tourism Education Company
JITOA	Jordan Inbound Tour Operators Association
JOHUD	Jordan Hashemite Fund for Human Development
JRA	Jordan Restaurant Association
JRF	Jordan River Foundation
JTB	Jordan Tourism Board
MFI	Micro-Finance Institution
MOL	Ministry of Labor
MOU	Memorandum of Understanding
MOTA	Ministry of Tourism and Antiquities
MTA	Madaba Tourism Association
NGO	Non-Governmental Organization
NTS	National Tourism Strategy
NTVS	National Tourism Visitors Survey
PDG	Program Development Grant
PSP	Private Sector Participation
RFP	Request for Proposal
RSCN	Royal Society for the Conservation of Nature
SME	Small and Medium Enterprises
SSC	Strategy Steering Committee
TDC	Tourism Development Corporation
TOR	Terms of Reference
UNESCO	United Nations Educational, Scientific, and Cultural Organization
USAID	United States Agency for International Development
VTC	Vocational Training Center

JORDAN: TOURISM SATELLITE ACCOUNT 2006/2007

1. INTRODUCTION

The USAID-funded Jordan Tourism Development Project has been working with the Government of Jordan on the strengthening of their tourism statistics and the development of a TSA since 2007.

In 2010, a first pilot TSA was attempted for Jordan seen as applicable to the year 2008. The finding at that time was that data limitations prevented the possibility of building the TSA. In that attempt to compile the TSA, it was not possible to balance supply with demand (overall the demand figures were greater than supply, which is impossible). Supply should be greater than demand as residents consume tourism products (in addition to tourists), so combined, supply is greater (or at least equal to) demand in that it includes expenditure and consumption by residents and tourists.

In order to try to identify why it was not possible to reconcile the TSA, the Consultant (in May 2012) held meetings with the following organizations, and collected/discussed the data identified in the Table below.

Organization	Data
Department of Statistics	<ul style="list-style-type: none">• National Tourism Visitor Survey (2006/07)• National Tourism Visitor Survey (2010/11)• Domestic Tourism Survey 2008• Industry Survey: Commercial Enterprises (Service Section)• Industry Survey: Transport, Storage and Communications• Input-Output Table: 2006 (covers 81 sectors)
Ministry of Tourism and Antiquities	<ul style="list-style-type: none">• Tourist arrivals• Cruise arrivals• Visitors to 28 sites• Accommodation occupancy• Tourism employment

Whilst the 'Jordan TSA Tables and Technical Notes report' from 2010 concluded that there must be a problem with either the supply or the demand data (or both), it has been concluded that this was not necessarily the case. Of course, there may be some inaccuracies in the supply or demand data, but the reconciliation should be resolvable.

It was necessary to particular consider:

- the weighting of the NTVS data
- demand side verification
- supply side verification
- gross output from tourism industries and non-tourism industries
- input output tables

Using this approach it has been possible to recompile Tables 1, 2, 4, 5, and 6 to complete the TSA and generate indicators such as Tourism Direct Gross Value Added (TDGVA).

The compiled TSA identifies all assumptions that have been made. In addition, where possible, suggestions have been made as to:

- Comments on issues in data collection.
- Comments on the expenditure sections of the NTVS and Domestic Tourism Survey.
- Comments on the Economic Surveys (Commercial Enterprises: Service Section and Transport, Storage & Communications).
- Other surveys that could assist with the compilation of future TSAs.

After our analyses, it is seen as best to reference this recompiled pilot TSA to the Year 2006/2007. So the reference year is 2006/2007. The recompilation does use the Domestic Tourism Survey information from 2008, but using this survey results in a relative small volume of domestic tourism compared with the

international inbound tourism for 2006/2007. So we have assumed that it has been a more robust approach to assume that the domestic estimates apply to 2006/2007 rather than to try to forward-estimate the international tourism to 2008.

The presentation of the recompiled pilot experimental TSA for 2006/2007 is made on a table-by-table basis for Tables 1, 2, 4, 5 and 6.

2. INBOUND INTERNATIONAL TOURISM (TSA TABLE 1)

2.1 General

The principal estimates that have to be made for populating TSA Table 1 are:

- Direct expenditure of inbound international tourists (in Jordan)
- Direct expenditure by inbound international day-visitors (in Jordan)
- Breakdown of the expenditure (tourist and day-visitor) into product categories
- Expenditure on behalf of the tourist by another party (usually a tour operator)
- Expenditure on behalf of the day-visitor by another party (usually a tour operator)

The Department of Statistics carried out a good sample survey of arriving and departing visitors and residents in 2006/2007. This National Tourism Visitor Survey (NTVS) provides the bulk of the information on tourism demand.

The Sample Survey was a substantial survey with a sample size for inbound visitors of more than 30,000 (See Annex 1 for the un-weighted data).

Though it has not been possible to obtain the original data (case by case data), the size of the sample and the general thoroughness of the exercise suggests that the figures will be relatively robust. Problems in grossing up from sample to 'universe' in visitor expenditure surveys usually occur with the process at road borders.

The build-up of the expenditure by overnight tourists by border post is shown in Table 2.1. More than half of the expenditure is associated with tourists departing through Queen Alia airport, suggesting that estimates will be robust from this survey.

Table 2.1 Breakdown of Expenditure for Overnight Tourists in 2006/2007

Border	Number of Overnight Tourists	Distribution	Total Expenditure of Overnight Tourists (JD)	Distribution
Queen Alia International Airport	1,269,621	34.0%	905,716	54.3%
King Hussein Airport	23,680	0.6%	14,509	0.9%
Aqaba Port	28,896	0.8%	7,499	0.4%
King Hussein Bridge	304,177	8.1%	149,160	8.9%
Omari	534,138	14.3%	261,901	15.7%
Jaber	790,816	21.2%	133,073	8.0%
Ramtha	186,687	5.0%	35,104	2.1%
Karameh	130,410	3.5%	21,968	1.3%
Jordan Valley	211,161	5.7%	50,350	3.0%
Mudawarah	148,468	4.0%	59,781	3.6%
Durrah	99,897	2.7%	26,176	1.6%
Wadi Arabah	5,702	0.2%	1,427	0.1%
Totals	3,733,653	100.0%	1,666,664	100.0%

Source: NTVS

There are other sources of tourist expenditure from transit visitors (JD 40 million) and day-visitors (JD 19 million) but these are relatively small. The bulk of the inbound expenditure, excluding international air transport, is by overnight tourists. For these overnight tourists the grossed up estimate from the NTVS 2006/2007 at JD 1.666 billion is seen as the best estimate and a robust estimate. It broadly concurs with the estimates from the Central Bank of Jordan (See Annex 2).

2.2 Breakdown of Tourist Expenditure

The NTVS gave a breakdown of expenditure based upon respondent's perceptions in answering the question to this breakdown. The breakdown is cast in terms of what a respondent is able to easily understand. Part of the questionnaire itself is shown in Annex 3.

Table 2.2 Breakdown of Overnight Tourist Expenditure 2006/2007

Question Asked	Aggregated Responses for Overnight Tourists JD millions	Distribution
12. Accommodation	277.5	16.7%
13. Food & Beverages	372.0	22.3%
14. Entertainment	182.3	10.9%
15. Medical treatment	144.5	8.7%
16. Study	77.5	4.7%
17. Local transport	140.7	8.4%
18. Shopping	392.8	23.6%
19. Other (specify)	78.6	4.7%
Total	1,665.9	100.0%

Source: NTVS 2006/07

The divergence between the data given by the respondents on their breakdown of expenditure and the data requirement in the TSA of CPC Version 2 for products, and the ISIC Version 3 or 4 for industries, is the prime reason why the first attempts at reconciliation could not be resolved.

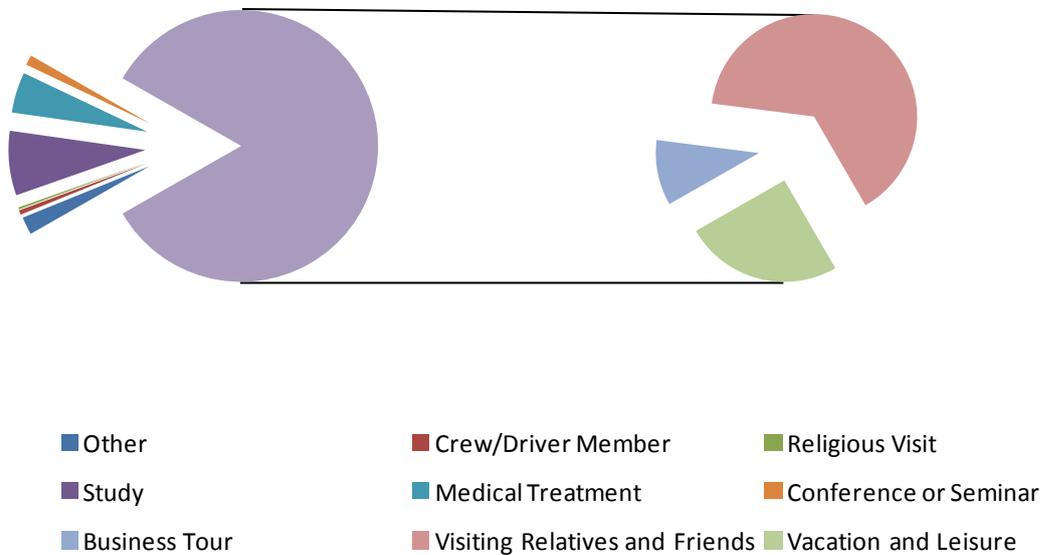
The key illustration of this is to look at accommodation, and food and beverage, and assess where this expenditure came from according to the purpose of visit of the overnight tourists. This is illustrated in Annex 4. The key point is further illustrated in the following Pie Chart.

The chart shows that a large proportion (54%) of the food and beverage spending comes from overnight tourists who are visiting friends and relatives. It is likely that a large part of this spend may be in other than the formal restaurant industry under ISIC 5520.

A similar consideration occurs with the use of formal accommodation under ISIC 5510. Overall there are 50.7 million nights spent by the overnight tourists in Jordan in 2006/2007. But the formal accommodation industry records only a tenth of these (See Annex 6). This would suggest that the spending on accommodation at only 16.7% of total spend in Jordan is about right, but also it would suggest that a large number of the nights are in other types of accommodation and that the respondents spent at a significant level outside of the formal accommodation sector.

These general arguments indicate that the spending by tourists has to be part allocated to the formal tourism industries and part allocated to other industries' supply outside of the formal tourism industries.

Expenditure on Food & Beverage according to trip purpose of overnight tourists



2.3 Day-visitors

Day-visitors were investigated by the ‘Jordan TSA Tables and Technical Notes report’. This Report noted that nearly one third of day visitors – 108,610 out of 340,550 – were on package tours. Of those on package tours, 108,527 reported the purpose of their trip as vacation (the few others were largely on religious visits). Moreover, of those on package tours 103,697 identified Petra as their favorite site, suggesting that virtually all package tours for day-visitors were to Petra, most of them probably from Israel.

The Report outlined an estimate for inbound day-visitor expenditures. The total was small when compared with inbound overnight tourists, but the Report added together the direct spend by day-visitors and the expenditure on the tourist’s behalf by tour operators. The Report came to the view that total day-visitor expenditure was of the order of JD 35 million. We have adopted this estimate for the re-compiled TSA.

2.4 Package Tours

In countries where package tours comprise a large percentage of the total travel into a country (e.g. 50% and more), the sums of money paid into the country on behalf of a tourist (mostly accommodation and sometimes transport) are very important to estimate. In Jordan the package tour proportion is around a tenth of overnight tourists (See Annex 5). Package tours are mainly focused in the European region markets, which includes Israel.

A clear estimate of the package tour expenditure coming into the country relies upon a number of variables, including:

- Number of inbound package tourists in the year.
- Prices of the different packages (from the visitor sample survey).
- Breakdown of the price into different components (focus groups with tour operators, or sample survey of tour operators).
- Estimates of which parts of those components (e.g. transport, accommodation etc.) come into the country.
- Whether or not the trip was a multi country trip, which, for example, the NTVS 2006/2007 suggested was quite significant for the foreigner segment (34.5%).

- Which transport carriers were used.

It is difficult to be clear about the picture in 2006/2007, and also difficult to be clear whether or not the respondents actually included this tour operator spend in their responses or not. For this reason we have not attempted to boost the spending of the overnight tourists over and above what is indicated in the NTVS at JD 1,666 million.

2.5 International Travel on Jordanian Carriers

For TSA Table 1, we have not included the expenditure on international travel on Jordanian carriers. Rather an estimate has been made for the contribution to the Jordanian economy from the tourist spending on Jordanian carriers, allied to the estimates in TSA Table 6.

TSA Table 1 is shown overleaf.

 Towards the Development of a Pilot Tourism Satellite Account for Jordan 2006/2007 (JD millions)			
TABLE 1			
Inbound tourism expenditure by products and categories of visitors			
Products	Total inbound tourism expenditure		
	Tourists (1.1)	Same-day visitors (1.2)	Total visitors (1.3) = (1.1) + (1.2)
A. Specific products			
A.1 Characteristic products			
1 – Accommodation	277.5		277.5
2 – Food & Beverages	372.0	7.0	379.0
3 – Local Passenger transport services (excluding air)	140.7	10.6	151.3
4 – Travel agencies and similar (1)		2.1	2.1
5 & 6 Entertainment (Cultural services, Sports and recreational services)	182.3	8.5	190.8
B. Non specific products			
1 - Services	300.6	0.6	301.2
2 - Goods (Shopping) (2)	392.8	5.8	398.6
TOTAL	1,665.9	34.6	1,700.5
number of trips	3,733,652	340,550	4,074,202
number of overnights	50,732,209	X	50,732,209
X does not apply			
(1) Corresponds to the services charged of the travel agencies or the tour operators			
(2) Excluded valuables and tourism single purpose consumer durables goods whose value exceeds the custom threshold, and that Balance of Payments statistics and National Accounts include as imports or exports of goods under general merchandise trade.			

3. DOMESTIC TOURISM (TSA TABLE 2)

Domestic Tourism was investigated by the 'Jordan TSA Tables and Technical Notes report' This Report used the data from a survey on tourism that was included in the Household Income and Expenditure Survey for 2008. It is known as the Domestic Tourism Survey 2008.

The total estimate of expenditure was modest in the light of a population of more than 6 million. Some JD 60 million was spent on domestic tourism trips. We have adopted the estimates made in the above report. TSA Table 2 is shown overleaf.

Towards the Development of a Pilot Tourism Satellite Account for Jordan 2006/2007 (JD millions)

TABLE 2
Domestic tourism expenditure by products, by types of trips and categories of visitor

Products	Resident visitors						Total domestic tourism expenditure		
	on a domestic trip			on an international trip (expenditure prior to leaving the country of			Tourists	Same-day visitors	Total visitors
	Tourists	Same-day visitors	Total visitors	Tourists	Same-day visitors	Total visitors			
(2.1)	(2.2)	(2.3) = (2.1) + (2.2)	(2.4)	(2.5)	(2.6) = (2.4) + (2.5)	(2.7) = (2.1) + (2.4)	(2.8) = (2.2) + (2.5)	(2.9) = (2.3) + (2.6)	
A. Specific products									
A.1 Characteristic products									
1 – Accommodation	6.1	X	6.1		X		6.1	X	6.1
2 – Food & Beverage	4.6	3.3	7.9				4.6	3.3	7.9
3 – Local Passenger transport services	7.1	9.3	16.4				7.1	9.3	16.4
4 – Travel agencies and similar (1)							0.0	0.0	0.0
5 & 6 Entertainment (Cultural services, Sport and	0.8	1.1	1.8				0.8	1.1	1.8
B. Non specific products									
Services	0.0	0.0	0.1				0.0	0.0	0.1
Goods	13.8	14.8	28.6				13.8	14.8	28.6
TOTAL	32.5	28.4	60.9	0.0	0.0	0.0	32.5	28.4	60.9
Number of trips (number of people taking trips)	860,720	3,647,500	4,508,219						
Number of overnights (sum over all trips of (number of people x number of nights)	3,391,445	X	3,391,445		X			X	

4. INTERNAL TOURISM CONSUMPTION TSA (TABLE 4)

TSA Table 4 brings together TSA Tables 1 and 2 plus other data, if this is available, on various topics such as social transfers etc. In fact, no information is available but we anticipate that it will not be substantial in numbers. By far the largest element in the TSA Expenditure (internal consumption) is that of the inbound international tourists staying overnight.

 Towards the Development of a Pilot Tourism Satellite Account for Jordan 2006/2007 (JD millions)									
Table 4									
Internal tourism consumption by products and types of items									
	Internal Tourism Expenditure			other components of tourism consumption				Total	Internal tourism consumption
	Inbound tourism expenditure	Domestic tourism expenditure	Internal tourism expenditure	Services associated to vacation accommodation on own account	Social transfers in kind	Other imputations	Tourism single purpose consumer durables purchased outside the context of a trip or before a trips		
Products	(1.3)	(2.9)	(4.1) = (1.3) + (2.9)	4.2	4.3	4.4	4.5	(4.6) = (4.2) + (4.3) + (4.4) + (4.5)	(4.7) = (4.1) + (4.6)
A. Specific products									
A.1 Characteristic products									
1 – Accommodation	277.5	6.1	283.6						283.6
2 – Food & Beverage	379.0	7.9	386.9						386.9
3 – Passenger transport services	151.3	16.4	167.6						167.6
4 – Travel agencies and similar (1)	2.1	0.0	2.1						2.1
5+6 Entertainment	190.8	1.8	192.6						192.6
B. Non specific products									
Services	301.2	0.1	301.2						301.2
Goods (2)	398.6	28.6	427.2						427.2
TOTAL	1,700.5	60.9	1,761.4						1,761.4
(1) Corresponds to the services charged of the travel agencies (2) Excluded valuables and tourism single purpose consumer durables goods which value exceeds the custom threshold, and that Balance of Payments statistics and National Accounts include as imports or exports of goods under general merchandise trade.									

5. PRODUCTION ACCOUNTS TSA (TABLE 5)

The Department of Statistics (DOS) produces exemplary information from their economic surveys and these have been used in order to produce the production accounts for a number of Tourism Characteristic Industries. In fact only five industries have been put together, namely:

- Hotels (ISIC 5510)
- Restaurants (ISIC 5520)
- Road Passenger Transport (ISIC 6021 & 6022)
- Travel Agencies etc. (ISIC 6304)
- Cultural, Sporting and Recreational industries (ISIC 92)

TSA Table 5 is entirely consistent with the usual National Accounts for a country. The only difference is that it highlights those Tourism Characteristic Industries that can be detailed accordingly. TSA Table 5 is shown overleaf.



Towards the Development of a Pilot Tourism Satellite Account for Jordan 2006/2007

TABLE 5

Production accounts of tourism industries and other industries - Figures in JD millions

Products	TOURISM INDUSTRIES						14. Other industries	15. Total output of domestic producers (at basic prices)
	1 - a. Accommodation services: ISIC 5510	2 - Restaurants and similar: ISIC 5520	4 - Road passenger transport: ISIC 6021 & 6022	8- Travel agencies and similar; ISIC 6304	9 and 10 all entertainment: ISIC 92	13. Total tourism industries		
	(5.1a)	(5.2)	(5.4)	(5.8)	(5.9)& (5.10)	(5.14)	(5.15) = (5.13) + (5.14)	
A. Specific products								
A.1 Characteristic products								
1 – Accommodation services for visitors	202.4					202.4		
2 – Restaurants and similar		177.3				177.3		
3 – Passenger transport services								
3.2 Road passenger transport services			436.6			436.6		
4 – Travel agencies and similar				25.3		25.3		
5+6 Entertainment (5)					49.9	49.9		
B. Non specific products								
Services								
Goods								
All other products								
TOTAL OUTPUT (at basic prices)	202.4	177.3	436.6	25.3	49.9	891.4	21,828	22,719.4
Total intermediate consumption (at purchasers price)	103.6	90.7	194.9	1.5	24.5	415.3	12,220	12,635.5
TOTAL GROSS VALUE ADDED OF INDUSTRIES (at basic prices)	98.8	86.5	241.7	23.8	25.4	476.1	9,608	10,084.0
Compensation of employees	39.2	34.4	31.2	15.4	13.9	134.1		
Other taxes less subsidies on production	14.8	13.0	32.2	1.2	3.4	64.5		
Depreciation	29.2	25.6	9.8	0.5	9.7	74.8		
Gross operating surplus	15.5	13.6	168.5	6.7	-1.6	202.8		
<i>Adjustments</i>	0	0	0	0	0	0		

X does not apply

(1) Corresponds to the services charged of the travel agencies

(2) Corresponds to the services charged of the tour operators

(3) Excluded valuables and tourism single purpose consumer durables goods which value exceeds the custom threshold of 100 JD at the time of purchase. Imports and exports of these products include as imports or exports of goods under general merchandise trade.

6. RECONCILIATION OF DEMAND AND SUPPLY (TABLE 6)

TSA Table 6 brings together the reconciliation of demand (Table 4) and supply (Table 5).

In doing the reconciliation, the key assumptions are what part of demand should be assigned to the formal tourism characteristic industries and what part can be assigned to other industries or suppliers.

Detailed information to do this with any precision is not available. However, we can make a plausible estimate and assumption based on the information that is available, notably from the NTVS 2006/2007. It is assumed that the data from the expenditure of the overnight tourists will be applicable to the total internal tourism consumption.

The key assumptions are as set out in Table 6.1

Table 6.1 Table 6 Assumptions

Expenditure	Use factor for selected components	Allocation to Formal Industry	Allocation to Other Industries	Components for formal industry
Accommodation	1	65%	35%	Vacation + Business + Conference
Food & Beverages	1	31%	69%	Vacation + Business + Conference
Entertainment	0.5	19%	81%	Vacation + Business + Conference
Medical Treatment	Other Services	0%	100%	
Study	Other Services	0%	100%	
Local Transport	0.75	75%	25%	
Shopping	1	0%	100%	
Other	Other Services	0%	100%	

For accommodation and for food and beverages, it is assumed that only expenditure from the vacation, business and conference visitors are using the formal accommodation and formal restaurant industries (based on the NTVS 2006/2007). Therefore the complementary assumption is that the visitors who have come to visit friends and relatives are not using these formal industries. Obviously the situation cannot be as rigid as that but it is a broadly plausible assumption for the purposes of reaching a broad estimate of the allocation between tourism characteristic industries and other industries.

TSA Table 6 is shown below.

TABLE 6
Reconciliation: Demand and Supply

Products	TOURISM INDUSTRIES												13. Other industries		14. Total output of domestic producers (at basic prices)		
	1- Accommodation services: ISIC 5510		2 - Restaurants and similar: ISIC 5520		4 - Road passenger transport: ISIC 6021 & 6022		8- Travel agencies and similar; ISIC 6304		9- All entertainment: ISIC 92		12- Total tourism industries						
	output	tourism share (in value)	output	tourism share (in value)	output	tourism share (in value)	output	tourism share (in value)	output	tourism share (in value)	output	tourism share (in value)	output	tourism share (in value)	output	tourism share (in value)	
A. Specific products																	
A.1 Characteristic products																	
1 – Accommodation	202.4	184.8										202.4	184.8	98.9	98.9	301.2	283.6
2 – Food & Beverage			177.3	118.7								177.3	118.7	268.2	268.2	445.5	386.9
3 – Passenger transport services																	
3.2 Road passenger transport services					436.6	125.7						436.6	125.7	41.9	41.9	478.5	167.6
4 – Travel agencies and similar							25.3	2.1				25.3	2.1	0.0	0.0	25.3	2.1
5+6 Entertainment									49.9	35.8		49.9	35.8	156.8	156.8	206.6	192.6
B. Non specific products																	
Goods & Services														21,262.2	376.6	21,262.2	376.6
Total output at basic prices	202.4	184.8	177.3	118.7	436.6	125.7	25.3	2.1	49.9	35.8	891.4	467.1	21,828.0	942.3	22,719.4	1,409.4	
Total intermediate consumption (at purchasers price)	103.6	94.6	90.7	60.8	194.9	56.1	1.5	0.1	24.5	17.6	415.3	229.2	12,220.1	527.5	12,635.5	756.8	
TOTAL GROSS VALUE ADDED OF INDUSTRIES (at basic prices)	98.8	90.2	86.5	57.9	241.7	69.6	23.8	2.0	25.4	18.2	476.1	237.9	9,607.8	414.8	10,084.0	652.7	
Compensation of employees	39.2	35.8	34.4	23.0	31.2	9.0	15.4	1.3	13.9	10.0	134.1	79.1					
Other taxes less subsidies on production	14.8	13.5	13.0	8.7	32.2	9.3	1.2	0.1	3.4	2.4	64.5	34.0					
Gross mixed income	29.2	26.7	25.6	17.1	9.8	2.8	0.5	0.0	9.7	7.0	74.8	53.6					
Gross operating surplus	15.5	14.2	13.6	9.1	168.5	48.5	6.7	0.6	-1.6	-1.1	202.8	71.2					
<i>Adjustments</i>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0					

7. CONCLUSIONS AND RECOMMENDATIONS

7.1 General

We have taken the information that is available for 2006/2007 and recompiled the Tables 1, 2, 4, 5, & 6 using an alternative approach to that used in the 'Jordan TSA Tables and Technical Notes report' of 2010. This alternative approach takes a more eclectic view of where supplies may come from. However, this approach gives a reasonable approximation of the economic value of tourism in the context of the National Accounts.

7.2 Tourism Direct Gross Value Added (TDGVA) 2006/2007

TDGVA in this analysis comes out at JD 653 million. It takes into account the direct spending of tourists in Jordan (tourists and day-visitors: both inbound and domestic). In comparison with Gross Value Added for the whole economy (JD 10,084 million in 2006/2007) it makes tourism spending's direct contribution to GVA of 6.5%.

It doesn't take into account the GVA attributable to the Jordanian air carriers in relation to these particular tourists carried in 2006/2007.

A very broad estimate of this expenditure would be as follows: -

- Overnight tourists' expenditure on Jordanian carriers in 2006/2007 equals JD 395 million (from NTVS).
- GVA for the international air transport industry is 21.6% in 2006/2007 (from DOS economic surveys).
- GVA attributable to the tourist spending equals JD 85 million.

Bringing in the contribution from the Jordanian air carriers would raise the TDGVA to JD 738 million, so making a 7.3% contribution to GVA (2006/2007).

7.3 Tourism Direct GDP (TDGDP) 2006/2007

Jordanian GDP in 2006/2007 comprised GVA plus the taxes (+13.1% approx.) to bring GDP in market prices up to JD 11.4 billion. We do not have the full picture on the taxes that will adjust the TDGVA to TDGDP at market prices. If the taxes on tourism are substantial, they usually raise the contribution to GDP above that of the contribution to GVA, but it is not clear that this is the situation.

7.4 Conclusions

Our analysis indicates that:

- The NTVS expenditure estimates are good for the purposes of putting together the demand picture for a Pilot Experimental TSA.
- The GDP figures are sound for the purposes of putting together the supply data for a Pilot Experimental TSA.
- Plausible assumptions can be made that allow a broad reconciliation to take place and thus a broad estimate of TDGVA to be made for 2006/2007.

7.5 Recommendations - Improvements in the process

Improvements have already been made, but we reiterate the lessons that would be worth taking forward into an updated TSA

- Firstly, tourism in Jordan has an exceptionally high level of inbound visitation for the purposes of visiting friends and relatives (VFR). Least is known about the activities of this particular segment which clearly has different visiting and expenditure patterns from other segments such as holiday travelers or business travelers etc. Knowing more about the activities of this segment would be helpful.
- Whilst package tours are not huge in numbers in Jordan, it would be helpful to have a clear idea of how much is coming into the country via payments on behalf of the tourist by the tour operators/travel agencies etc.

- The sample surveys by DOS are excellent. Access to the original case by case data in the sample surveys would be very useful for analysts, so that a proper understanding of the relative sampling errors can be achieved. There would be no breach of confidentiality in this.
- The Economic Sample Surveys by DOS are excellent. Within the constraints of confidentiality, more analyses of the key industries involved in tourism would help the supply data, notably in trying to develop tourism characteristic industries and indeed industries supplying goods and services to tourists.

This analysis has put together a first Pilot Experimental TSA for Jordan for the reference year 2006/2007. Good data is available to suggest that this process can be updated for 2010/2011.

ANNEX 1: UNWEIGHTED SAMPLE NUMBERS 2006/2007

Nationality	Daily Spend JD excl. international transport	Average Length of Stay - nights	Numbers in Sample
African countries	67.2	8.1	58
American	46.1	14.2	1,618
Asian Countries	32.7	9.9	1,075
European Countries	55.1	6.9	8,530
Oceania Countries	50.3	10.3	264
Middle East	38.0	11.7	18,086
Jordan	24.2	23.1	5,927
Total			35,558

Source: NTVS 2006/2007

ANNEX 2: CENTRAL BANK ESTIMATES OF TOURISM RECEIPTS
Tourism Receipts - Annual

JD millions JTB Newsletter	2003	2004	2005	2006	2007	2008	2009	2010	2011
2006	753	943	1,022	1,164					
2007		943	1,022	1,461	1,639				
2008					1,638	2,089			
2009						NA	NA		
2010							2,067	2,423	
2011								2,545	2,130

Source: Central Bank of Jordan (quoted by Jordan Tourist Board)

ANNEX 3: THE EXPENDITURE PART OF THE QUESTIONNAIRE FOR THE NTVS 2006/2007

4. Expenditure Patterns																																									
401	How many nights did you spend in Jordan?				_ _ _ _																																				
402	Which type of accommodation did you <u>mostly</u> stay at when in Jordan?	1. Hotel 2. Suite and apartment transport hotel (specify)..... 3. Private apartment 4. Stayed with friends or relatives	5. Own house or apartment 6. Means of 7. Other 8. Have not stayed for an overnight	_ _																																					
403	Who made arrangements for the main trip?	1. Travel agency or tour operator (continue) 2. Own arrangement 3. Employer 4. Conference organizer 5. Association	Go to 406	_																																					
404	Amount paid in your country	<table border="1"> <thead> <tr> <th colspan="4">Total amount in currency</th> </tr> <tr> <th>JD</th> <th>US\$</th> <th>Euro</th> <th>Other (specify)</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			Total amount in currency				JD	US\$	Euro	Other (specify)					_ _ _ _ _																								
Total amount in currency																																									
JD	US\$	Euro	Other (specify)																																						
405	What does the amount paid in your country include?	A. Tickets 1. One way 2. Two way B. Accommodation 3. Full board 5. B.B. 4. Half board 4. Only Bed			_ _																																				
406	What was your estimated expenditure in Jordan on this trip including transport?	<table border="1"> <thead> <tr> <th colspan="4">Total amount in currency</th> </tr> <tr> <th>JD</th> <th>US \$</th> <th>Euro</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			Total amount in currency				JD	US \$	Euro	Other					_ _ _ _ _																								
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407	In which areas did you spend your money? (Please specify the amount of expenditure on each of the following)	<table border="1"> <thead> <tr> <th>Expenditure</th> <th>Amount</th> <th>%</th> </tr> </thead> <tbody> <tr> <td>10. Jordanian international transport</td> <td></td> <td></td> </tr> <tr> <td>11. Non Jordanian international transport</td> <td></td> <td></td> </tr> <tr> <td>12. Accommodation</td> <td></td> <td></td> </tr> <tr> <td>13. Food & Beverages</td> <td></td> <td></td> </tr> <tr> <td>14. Entertainment</td> <td></td> <td></td> </tr> <tr> <td>15. Medical treatment</td> <td></td> <td></td> </tr> <tr> <td>16. Study</td> <td></td> <td></td> </tr> <tr> <td>17. Local transport</td> <td></td> <td></td> </tr> <tr> <td>18. Shopping</td> <td></td> <td></td> </tr> <tr> <td>19. Other (specify)</td> <td></td> <td></td> </tr> <tr> <td>Total</td> <td></td> <td></td> </tr> </tbody> </table>	Expenditure	Amount	%	10. Jordanian international transport			11. Non Jordanian international transport			12. Accommodation			13. Food & Beverages			14. Entertainment			15. Medical treatment			16. Study			17. Local transport			18. Shopping			19. Other (specify)			Total			_ _ _ _ _		
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408	How many persons were included in the above expenditure?				_ _																																				
409	What was the main source of funds for your trip?	1. Self 2. Financed by employer	3. Financed by government 4. Other (specify).....	_																																					

ANNEX 4: Expenditure Breakdown for Overnight Tourists (JD Million)

Category of Spend	Ot her	Crew/Driver Member	Religious Visit	Stu dy	Medical Treatment	Conference or Seminar	Business Tour	Visiting Relatives and Friends	Vacation and Leisure	Total
Accommodation	7.9	0.3	1.2	27.6	21.0	8.3	55.9	38.7	116.5	277.5
Food & Beverages	7.8	2.0	0.9	28.5	18.0	4.4	32.0	200.6	77.7	372.0
Entertainment	2.0	0.1	1.2	5.8	3.4	1.4	8.0	102.1	58.5	182.3
Medical Treatment	0.4	0.1	0.0	0.6	129.7	0.0	0.5	11.3	1.9	144.5
Study	0.7	0.0	0.0	72.2	0.0	0.0	0.0	4.2	0.4	77.5
Local Transport	1.7	0.3	0.5	9.5	6.9	1.8	15.8	75.3	28.8	140.7
Shopping	9.5	3.1	1.6	12.3	15.2	5.2	32.5	235.8	77.7	392.8
Other	2.6	2.8	0.2	4.7	3.4	0.4	5.6	35.9	23.1	78.6
TOTAL	32.6	8.7	5.6	161.2	197.5	21.4	150.3	704.0	384.6	1665.9

Source: NTVS 2006/2007

ANNEX 5: NUMBER OF PACKAGE TOURS 2006/2007

No. of Tourists عدد السياح		نسبة التغير	عدد الليالي السياحية Tourist Nights		نسبة التغير	معدل الإقامة Length of Stay		
2006	2007*	% Relative Change 07/06	2006	2007*	% Relative Change 07/06	2006	2007	
3,184	2,785	-12.5%	5,842	6,743	15.4%	1.8	2.4	Africa
39,553	37,411	-5.4%	105,932	113,271	6.9%	2.7	3.0	Americas
40,927	53,671	31.1%	89,086	125,017	40.3%	2.2	2.3	Asia & Pacific
166,400	234,042	40.7%	860,728	1,185,636	37.7%	5.2	5.1	Europe
28,277	31,716	12.2%	101,321	140,990	39.2%	3.6	4.4	Arabs
278,341	359,625	29.2%	1,162,909	1,571,657	35.1%	4.2	4.4	Total

Source: Ministry of Tourism and Antiquities

ANNEX 6: ROOM NIGHTS IN TOURIST ACCOMMODATION 2006

التصنيف Classification	الشهر Month		Total 2006
Five Stars خمسة نجوم	غرف	Room	1042013
	نزلاء	Arrivals	714099
	ليالي	Bed	1507340
Four Stars اربعة نجوم	غرف	Room	555395
	نزلاء	Arrivals	507140
	ليالي	Bed	940281
Three Stars ثلاثة نجوم	غرف	Room	439239
	نزلاء	Arrivals	312002
	ليالي	Bed	720156
Two Stars نجمتين	غرف	Room	244959
	نزلاء	Arrivals	189972
	ليالي	Bed	416530
One Stars نجمه	غرف	Room	122371
	نزلاء	Arrivals	97330
	ليالي	Bed	211233
Apartment B شقق ب	غرف	Room	66521
	نزلاء	Arrivals	29224
	ليالي	Bed	137184
Apartment C شقق ج	غرف	Room	234239
	نزلاء	Arrivals	99116
	ليالي	Bed	542572
Suites A اجنحة أ	غرف	Room	8579
	نزلاء	Arrivals	5890
	ليالي	Bed	15469
Suites B اجنحة ب	غرف	Room	37467
	نزلاء	Arrivals	18897
	ليالي	Bed	72394
Suites C اجنحة ج	غرف	Room	41366
	نزلاء	Arrivals	29624
	ليالي	Bed	82491
Camping مخيمات	غرف	Room	14893
	نزلاء	Arrivals	18665
	ليالي	Bed	27270
hostel نزل	غرف	Room	5173
	نزلاء	Arrivals	4960
	ليالي	Bed	8682
Unclassified فنادق غير مصنفة	غرف	Room	168333
	نزلاء	Arrivals	162502
	ليالي	Bed	341363
Grand Total مجموع كلي 2006	غرف	Room	2980548
	نزلاء	Arrivals	2189421
	ليالي	Bed	5022965